



### Data Quality Clean Up:

#### Q4. Income and Housing Data Quality: Income and Sources at Annual Assessment

REMEMBER! When doing the missing annual assessment information, you will need to date the information to correspond to the project entry date. It should be that date, combined with the correct year for your operating year for your APR. If the resident entered the program between

May and December of any year, you would put 2016 as the year for the assessment you are doing for this data clean up. If they moved in between January and April, you would use 2017 as the assessment year for the assessment you are doing for this data clean up. That will effect change on your data quality report. Remember to do one, refresh your Data Quality report and see if the numbers are going down.

To complete these updates, you will need to run your Data Quality Detail Report and open the export title "Data DQ 4 (validation only)". This spreadsheet will detail what residents will need to have an annual assessment done. From there, you will utilize the client ID or their name to find their record in ClientTrack.

Step 1: Search and find the client who is missing an annual assessment.

Step 2: Click the blue button under enrollments

The screenshot shows the ClientTrack web application interface. At the top, there's a navigation bar with "Clients" and a search bar. Below that is a user profile for "Flash Gordon" with a bell icon. The main content area is titled "Flash Gordon's Dashboard". It contains three sections: "Flash Gordon's Information", "Flash's Enrollments", and "Flash's Services". In the "Flash's Enrollments" section, there is a table with one row. A blue button with a plus icon is circled in the first column of this table. The "Flash's Services" section shows a table with three rows of service data.

Flash's Enrollments						
1 result found.						
Enrollment Description	Case Members	Enroll Date	Exit Date	Organization	Last Assessment Completed	Enroll ID
My Training Org CoC - PSH	2	12/29/2016		My Training Organization	12/29/2016	10657

Flash's Services				
3 results found.				
Date	Service	Units	\$ Total	Organization
12/29/2016	Case Management	1.00	\$0.00	My Training Organization
12/29/2016	Bus Pass	1.00	\$0.00	My Training Organization
12/29/2016	Case Management	1.00	\$0.00	My Training Organization

Step 3: On the drop-down menu choose Update/Annual Assessment

GEORGIA HOUSING AND FINANCE AUTHORITY Training - ClientTrack 15 - Google Chrome

Secure | https://west.clienttrack.net/15/MainPage.aspx?InLine=false

ClientTrack™ Clients All Search

GABOSTrain01 (Training) Help Sign Out

Flash Gordon  
12/6/1969 406314

Flash Gordon's Dashboard

Flash Gordon's Information

Name: Gordon, Flash Birth Date: 12/6/1969 Age: 47  
Gender: Male Disabling Condition: Yes Veteran: Yes  
Ethnicity: Hispanic/Latino Race: American Indian or Alaska Native, Asian, Black or African American

Flash's Enrollments

1 result found.

Enrollment Description	Case Members	Enroll Date	Exit Date	Organization	Last Assessment Completed	Enroll ID	Exit ID
My Training Org CoC - PSH	2	12/29/2016		My Training Organization	12/29/2016	10657	

Current

My Training Org CoC - PSH

3 results found.

Service	Units	\$ Total	Organization
Case Management	1.00	\$0.00	My Training Organization
Bus Pass	1.00	\$0.00	My Training Organization
Case Management	1.00	\$0.00	My Training Organization

HUD Program Enrollment

Select the Program you are enrolling the client into. ClientTrack will display a list of clients in the client's family. Please select all the clients you are enrolling.

Program: My Training Org CoC - PSH

Household - Excerpt from the HMIS Data Standards Manual "A household is a single individual or a group of persons who apply together to a continuum project for assistance and who live together in one dwelling unit (or, for persons who are not housed, who would live together in one dwelling unit if they were housed)."

Name	Gender	Age	Project Entry Date	Case Manager	Relationship to Head of Household	Date Of Move In
Gordon, Flash	Male	47	12/29/2016	Michelle Milliken	Self	
Hero, Ineeda	Female	40			-- SELECT --	
America, Captain	Male	11	12/29/2016	Michelle Milliken	Other Non-Family	

Restriction: Restrict to Organization Restrict to MOU/InfoRelease

Save No Changes

Step 4: Check/confirm which client this assessment will be for and click save

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ClientTrack™ Clients All Search

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Assessment For Enrollment

Enrollment

Gordon, Flash

America, Captain

HUD Program Enrollment

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Program: My Training Org CoC - PSH

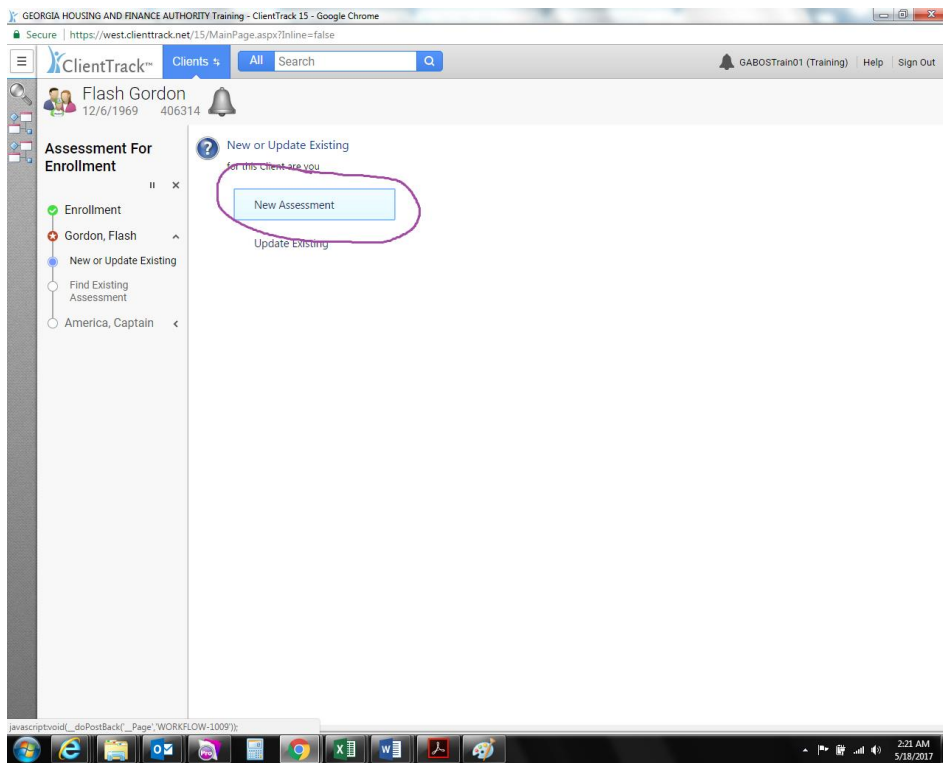
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Hero, Ineeda	Female	40			-- SELECT --	
America, Captain	Male	11	12/29/2016	Michelle Milliken	Other Non-Family	

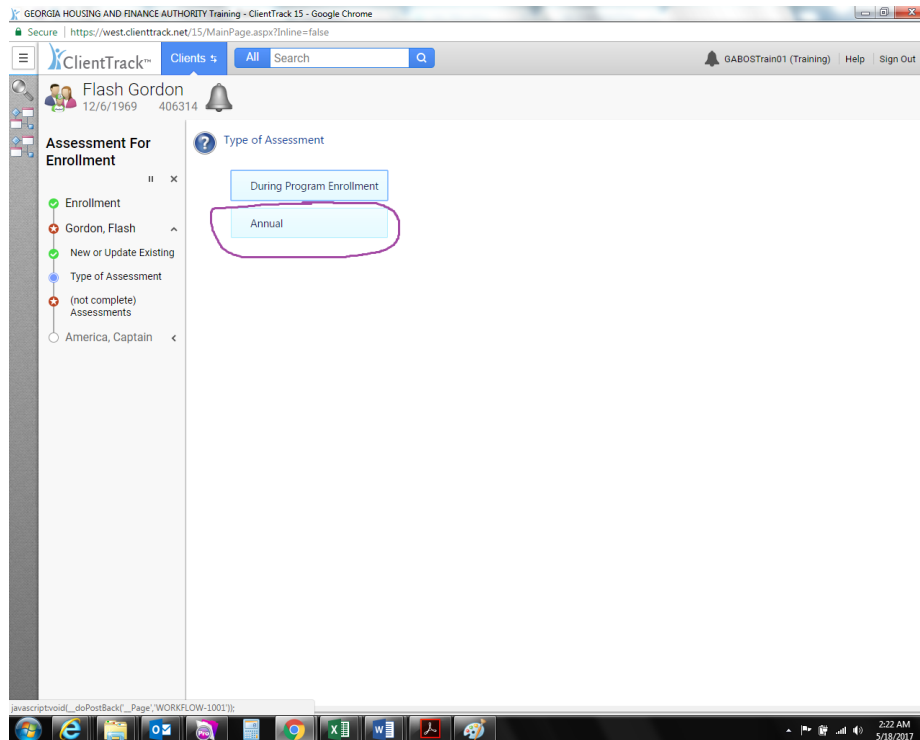
Restriction: Restrict to Organization Restrict to MOU/InfoRelease

Save No Changes

Step 5: Choose NEW ASSESSMENT



## Step 6: Choose ANNUAL ASSESSMENT



Step 7: REMEMBER! This is where you enter the project entry date and then year based on month (see above)

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ClientTrack™ Clients All Search

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12/6/1969 406314

Assessment For Enrollment

HUD Program Enrollment Universal Data Assessment

Complete the information below related to the selected client's housing status and other relevant information.

Note: Because 3.917 reflects real time data entry as described in the Data Dictionary, the Default Last Assessment button will not bring in any 3.917 data.

Default Client's Last Assessment

Assessment Date: 04/01/2017

Age at Assessment: 47

Assessment Type: Annual

Assessor: GABOSTrain01

Program: My Training Org CoC - PSH

Health Insurance - Please indicate whether or not the client is covered by health insurance. If so, you will be able to record health insurance sources for the client.

Default Last Insurance Status

Covered by Health Insurance: -- SELECT --

Type	Status	Reason No	Other Coverage
Private	-- SELECT --	-- SELECT --	
Private - Employer	-- SELECT --	-- SELECT --	
Private - Individual	-- SELECT --	-- SELECT --	
Medicare	-- SELECT --	-- SELECT --	
Medicaid	-- SELECT --	-- SELECT --	
State Children's Health Insurance Program S-CHIP	-- SELECT --	-- SELECT --	
Military Insurance	-- SELECT --	-- SELECT --	
State Funded	-- SELECT --	-- SELECT --	
Combined Children's Health Insurance / Medicaid Program	-- SELECT --	-- SELECT --	
Indian Health Service (IHS)	-- SELECT --	-- SELECT --	
Health insurance obtained through COBRA	-- SELECT --	-- SELECT --	

Save

Step 8: Answer if client is covered by health insurance. If yes, give details, hit save.  
If no, hit save.

GEORGIA HOUSING AND FINANCE AUTHORITY Training - ClientTrack 15 - Google Chrome

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ClientTrack™ Clients All Search

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Assessment For Enrollment

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Default Client's Last Assessment

Assessment Date: 04/01/2017

Age at Assessment: 47

Assessment Type: Annual

Assessor: GABOSTrain01

Program: My Training Org CoC - PSH

Health Insurance - Please indicate whether or not the client is covered by health insurance. If so, you will be able to record health insurance sources for the client.

Default Last Insurance Status

Covered by Health Insurance: No

Type	Status	Reason No	Other Coverage
Private	No	-- SELECT --	
Private - Employer	No	-- SELECT --	
Private - Individual	No	-- SELECT --	
Medicare	No	-- SELECT --	
Medicaid	No	-- SELECT --	
State Children's Health Insurance Program S-CHIP	No	-- SELECT --	
Military Insurance	No	-- SELECT --	
State Funded	No	-- SELECT --	
Combined Children's Health Insurance / Medicaid Program	No	-- SELECT --	
Indian Health Service (IHS)	No	-- SELECT --	
Health insurance obtained through COBRA	No	-- SELECT --	

Save

Step 9: Confirm if any barriers have changes within the year. Hit save and close.

ClientTrack™

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Assessment For Enrollment

Enrollment  
Gordon, Flash  
New or Update Existing  
Type of Assessment  
Annual Assessments  
Barriers / Special Needs  
Domestic Violence  
Income  
America, Captain

HUD Program Enrollment Universal Data Assessment Barriers

Use this form to identify whether a client has each individual barrier or not. The Clients last assessment is displayed as a default. You may, optionally, click **Previous Barriers Detail** to view information about the defaulted records or click **View Barrier History** to review all previous barriers.

View Barrier History

Assessment Active

Identified Date: 04/01/2017

Barrier	Help	Barrier Present?	Receiving Services / Treatment	Condition is Indefinite	Documentation of the disability and severity on file	Explanation
Alcohol Abuse		No				
Chronic Health Condition		Yes	No	Yes	No	COPD
Developmental Disability		No				
Drug Abuse		No				
HIV/AIDS		No				
Mental Health		Yes	No	Client doesn't know	No	PTSD
Physical Disability		No				

Save Save & Close

Step 10: Note changes to DV status

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Assessment For Enrollment

Enrollment  
Gordon, Flash  
New or Update Existing  
Type of Assessment  
Annual Assessments  
Barriers / Special Needs  
Domestic Violence  
Income  
America, Captain

HUD Program Enrollment Universal Data Assessment Domestic Violence Assessment

If the client has been a victim of domestic violence, select Yes for Domestic Violence Experience, and select when the experience occurred.

Default Client's Last Assessment

Assessment Active

Assessment Date: 04/01/2017

Domestic Violence Experience:

- ☐ Yes
- ☒ No
- ☐ Client doesn't know
- ☐ Client refused
- ☐ Data Not Collected

Restriction:

- ☐ Restrict to Organization
- ☒ Restrict to MOU/InfoRelease

Save

## Step 11: Enter Income-this includes cash and non-cash.

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ClientTrack™ Clients All Search

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Assessment For Enrollment

- Enrollment
- Gordon, Flash
- New or Update Existing
- Type of Assessment
- Annual Assessments
- Barriers / Special Needs
- Domestic Violence
- Income
- America, Captain

Universal Data Assessment Domestic Violence Assessment Income and Sources, Non-Cash Benefits

Indicate below the client's sources of **monthly** income, non-cash benefits and expenses.

The following instructions are quoted from the HMIS Data Manual:

- When a client has income, but does not know the exact amount, a "Yes" response should be recorded for both the overall income question and the specific source, and the income amount should be estimated.
- Income received by or on behalf of a minor child should be recorded as part of household income under the Head of Household, unless the federal funder in the HMIS Program Specific Manual instructs otherwise. Income should be recorded at the client-level for heads of household and adult household members. Projects may choose to collect this information for all household members including minor children, as long as this does not interfere with accurate reporting per funder requirements. Projects collecting data through client interviews should ask clients whether they receive income from each of the sources listed rather than asking them to state the sources of income they receive.
- Income data should be recorded only for sources of income that are current as of the information date (i.e. have not been specifically terminated). As an example, if a client's employment has been terminated and the client has not yet secured additional employment, the response for Earned Income would be "No." As a further example, if a client's most recent paycheck was 2 weeks ago from a job in which the client was working full time for \$15.00/hour, but the client is currently working 20 hours per week for \$12.00 an hour, record the income from the job the client has at the time data are collected (i.e. 20 hours at \$12.00 an hour).

Default Last Assessment

Assessment Active

Assessment Date: 04/01/2017

Income from Any Source: Yes

Non-Cash Benefits from Any Source: Yes

Expenses: SELECT

Income

Type	Description	Monthly Amount	Restriction
Earned Income (i.e., employment income)			Restrict to MOU/InfoRelease
Unemployment Insurance			Restrict to MOU/InfoRelease
Count/Total Monthly Income:		0 \$0.00	

Save and Close

Step 12: If you answered yes, enter amounts/types into cash and/or non-cash. Hit save and close. If you answered no, skip entering additional data and hit save and close.

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ClientTrack™ Clients All Search

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Assessment For Enrollment

- Enrollment
- Gordon, Flash
- New or Update Existing
- Type of Assessment
- Annual Assessments
- Barriers / Special Needs
- Domestic Violence
- Income
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Universal Data Assessment Domestic Violence Assessment Income and Sources, Non-Cash Benefits

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Default Last Assessment

Assessment Active

Assessment Date: 04/01/2017

Income from Any Source: Yes

Non-Cash Benefits from Any Source: Yes

Expenses: SELECT

Income

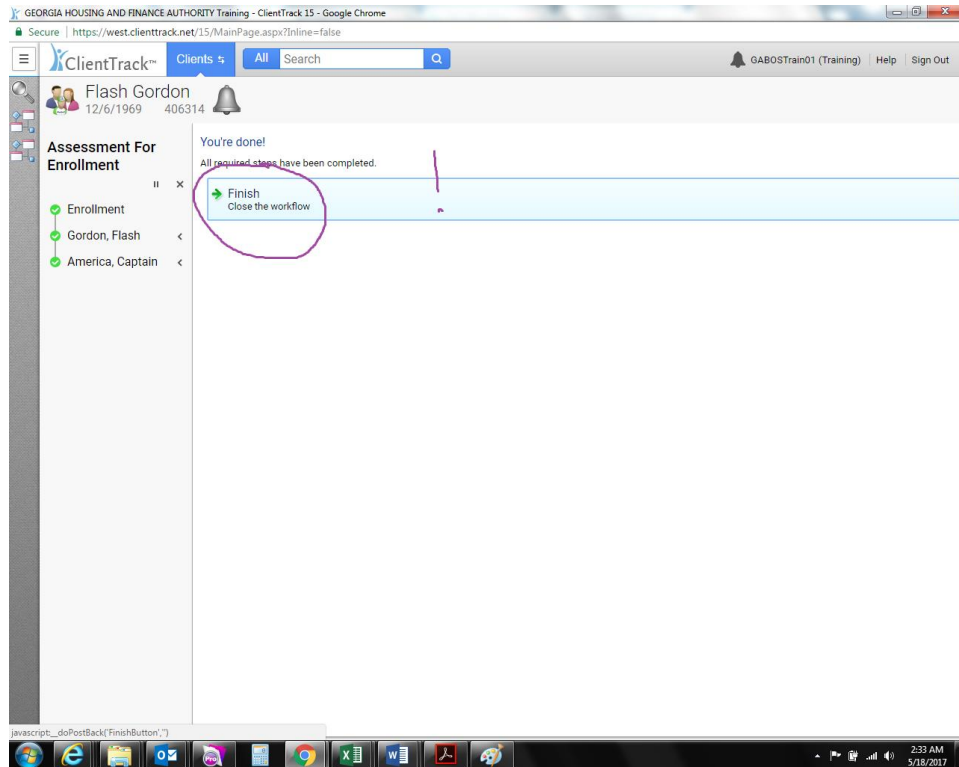
Type	Description	Monthly Amount	Restriction
Earned Income (i.e., employment income)			Restrict to MOU/InfoRelease
Unemployment Insurance			Restrict to MOU/InfoRelease
Supplemental Security Income (SSI)		\$1.00	Restrict to MOU/InfoRelease
Social Security Disability Income (SSDI)			Restrict to MOU/InfoRelease
Veteran's Disability Payment			Restrict to MOU/InfoRelease
Private Disability Insurance			Restrict to MOU/InfoRelease
Worker's Compensation			Restrict to MOU/InfoRelease
Temporary Assistance for Needy Families (TANF)			Restrict to MOU/InfoRelease
General Assistance			Restrict to MOU/InfoRelease
Retirement income from Social Security			Restrict to MOU/InfoRelease
Veteran's Pension			Restrict to MOU/InfoRelease
Other Pension			Restrict to MOU/InfoRelease
Child Support			Restrict to MOU/InfoRelease
Alimony or other spousal support			Restrict to MOU/InfoRelease
Other Income			Restrict to MOU/InfoRelease
Count/Total Monthly Income:		1 \$1.00	

Non-Cash Benefits

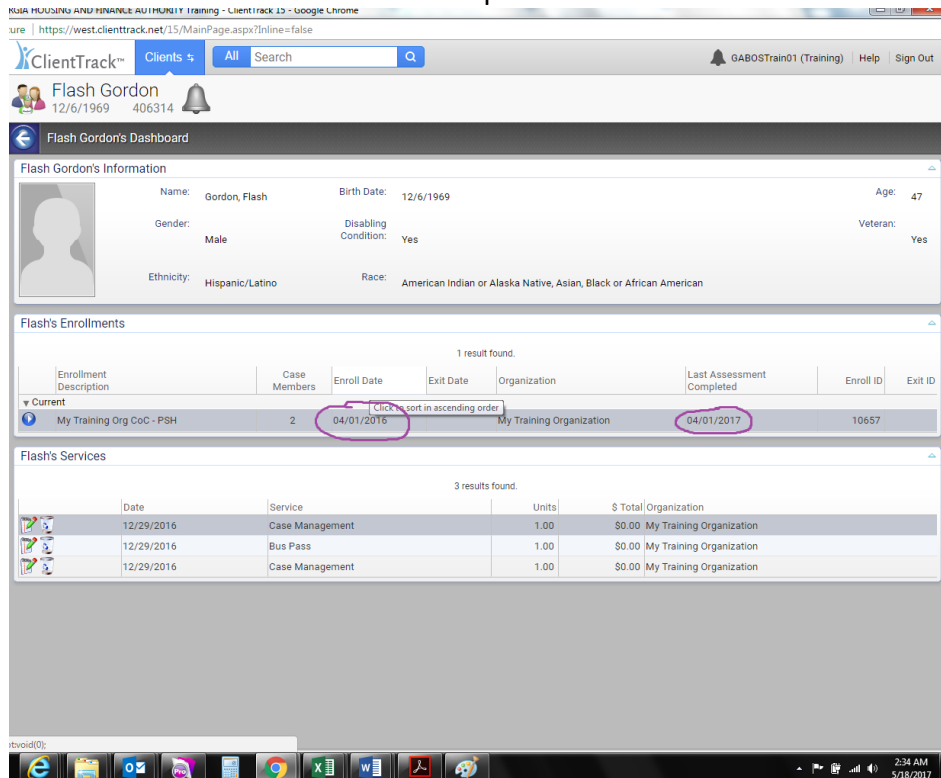
Type	Description	Monthly Amount	Restriction
Supplemental Nutrition Assistance Program (SNAP) (Food Stamps)		1.00	Restrict to MOU/InfoRelease
Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)			Restrict to MOU/InfoRelease
Count/Total Monthly Income:		1 \$1.00	

Save and Close

Step 13: When you reach this page, you will know you have entered everything as it should be.  
Hit Finish to close the workflow.



Step 14: You will be returned to the dashboard and you will look to confirm the last assessment completed





Step 15: Return to your Data Quality report (that you hid) and hit the refresh button to confirm the number of errors has decreased

HUD Data Quality Report

5/18/2016 to 5/18/2017

Data Element	Error Count	% of Error Rate
Destination (3.12)	0	0.00%
Income and Sources (4.2) at Entry	3	11.11%
Income and Sources (4.2) at Annual Assessment	0	0.00%
Income and Sources (4.2) at Exit	2	20.00%

**Q5. Chronic Homelessness**

Entering into project type	Count of total records	Missing time in institution (3.917.2)	Missing time in housing (3.917.2)	Approximate Date started (3.917.3) DK/R/missing	Number of times (3.917.4) DK/R/missing	Number of months (3.917.5) DK/R/missing	% of records unable to calculate
ES, SH, Street Outreach	0			0	0	0	0.00%
TH	0	0	0	0	0	0	0.00%
PH (all)	27	0	1	0	0	0	3.70%
Total	27						3.70%

**Q6. Timeliness**

Time for Record Entry	Number of Project Entry Records	Number of Project Exit Records
0 days	18	16
1-3 Days	5	0
4-6 days	0	0
7-10 days	0	0

CoC Filter - You may optionally filter by a single CoC to filter the report results. From implementation history only one CoC is allowed to be set. If specified, this CoC must match either the client's enrollment head of household CoC or (if that is blank) then this location must match one of the CoC locations identified for the associated program.

State Filter for CoC: -- SELECT --

CoC (Optional): -- SELECT --

Report Schedule Report Cancel

Continue this process until the error count reaches zero.